Indicators

November 2003

In shares by total volume and expenditure on fruits for the month in France

The main fruits

%	Volumes	Expenditure
Easy peelers	19	21
Apple	22	18
Banana	12	9

The trends for the main produce of the month significantly influence the overall situation of the fruit market. A column entitled 'Indicators' discussing these fruits precedes the pages devoted to a selection of exotic and citrus fruits.

Nov. 2003 / Nov. 2002			
Prcie	=↘	Volume	↘

Easy peelers

After a flamboyant start of the season, the easy peeler market changed completely in November. On the one hand, the quantities available increased considerably with the start of the Spanish Nules season, with large volumes, and the true start of the Corsican and Moroccan seasons. In addition, the appearance of serious problems of quality in a significant proportion of supplies (caused by heavy rainfall throughout the month in the main production zones) had a very negative impact on demand.

Nov. 2003 / Nov. 2002			
Prcie	↗	Volume	=↘

Apple

Performance in November was mixed. As in the preceding months, supplies were larger than might have been deduced from harvest forecasts. Operators had to continue to ship volumes of small or fragile fruits, whose quantities have been substantial this season. Although the price of 75/80 was satisfactory, that of 60/70 was disappointing. Available stocks are now 18% down on last year, whereas the drop in production has only been 10%.

Nov. 2003 / Nov. 2002			
Prcie	↗↗	Volume	=↘

Banana

Satisfactory average price conditions were achieved on the banana market in most EU countries after a catastrophic summer and a difficult beginning to the autumn. But this good performance should be viewed in relative terms. It is explained mainly by markedly insufficient supplies in all the countries of the community. The real driving force in France was export to countries in the north of the EU, while local trade indicators remained at an alarming level.

Notes concerning market appraisal methodology

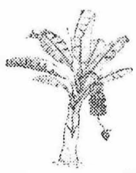
The statistics on the following pages are estimates of quantities put on the market in France. They are only calculated for the main supplier countries and are drawn up using information on weekly arrivals or market release statements by representative operators. The past figures are kindly provided from the POMONA data base and processed by CIRAD. The figures in the 'Main fruits' section above are provided by the CTIFL, with SECODIP being the source. The data published in the French market pages is provided solely as a guide and CIRAD accepts no responsibility for their accuracy. The illustrations are reproduced with the kind permission of Fabrice Le Bellec (CIRAD-FLHOR).

Banana

NOVEMBER 2003

Monthly comparison: Nov. 2003 / Oct. 2003	
Price	Volumes
↗ + 13%	↘ – 11%

Annual comparison: Nov. 2003 / Nov. 2002	
Price	Volumes
↗↗ + 31%	=↘ – 3%

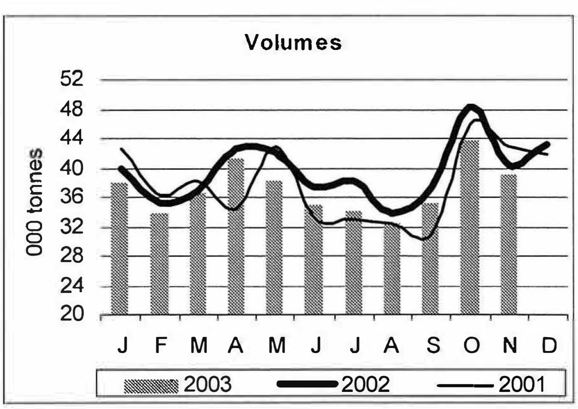


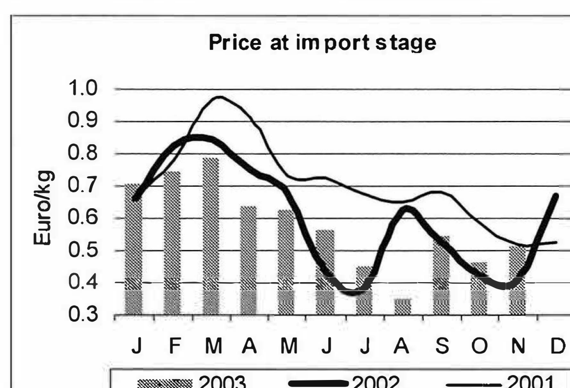
Satisfactory average price conditions were achieved on the banana market in most EU countries after a catastrophic summer and a difficult beginning to the autumn. But this good performance should be viewed in relative terms. It is explained mainly by markedly insufficient supplies in all the countries of the community. The real driving force in France was export to countries in the north of the EU, while local trade indicators remained at an alarming level.

The quantities available—from most origins—were distinctly lower than average. Only shipments from Africa were larger, with Cameroon maintaining the dynamics of the preceding months. Shipments from the West Indies decreased by more than 10% as the quantities from Martinique were particularly small. Likewise, supplies of dollar bananas in the EU were nearly 5% down in spite of an overall increase of more than 10% in shipments to all destinations as a whole. The good performance of the French market is therefore explained to a considerable extent by particularly active exports to Germany, Belgium and Holland. Promotion operations on the domestic market had been at their lowest level ever since October and this continued to weigh on sales. Although performance was as satisfactory in Spain, it was dull in Italy and poor in the United Kingdom.

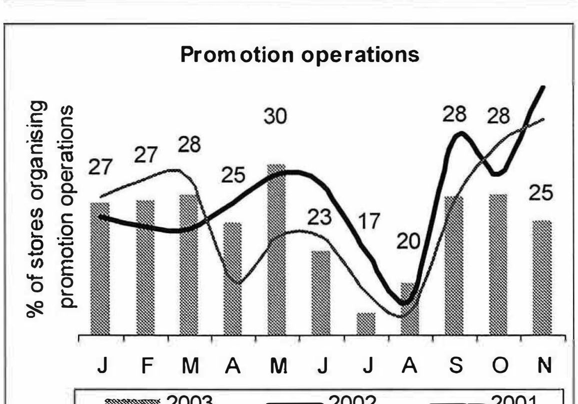
Estimated market releases in France

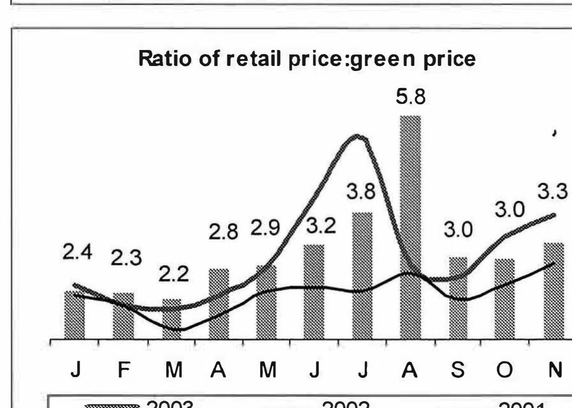
Tonnes	November 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2003	2003/2002	2003/2001
Côte d'Ivoire	7 769	- 9	- 27	81 232	- 11	- 13
Cameroon	10 470	+ 12	- 10	103 633	+ 8	+ 2
Martinique	14 577	- 11	0	156 358	- 8	+ 4
Guadeloupe	6 130	+1	0	65 538	- 11	- 4
Total	**38 946**	**- 3**	**- 9**	**406 761**	**- 6**	**- 2**





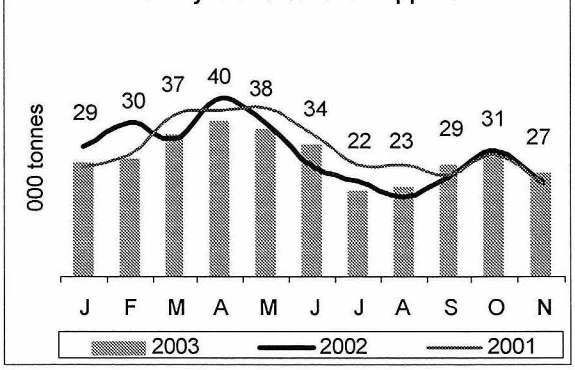
Retail market in France



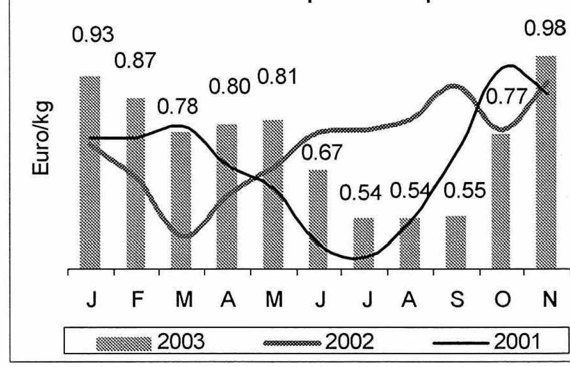


Banana — Indicators for French export markets

Spain

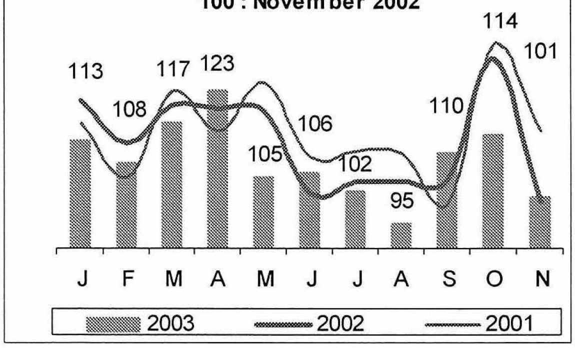


Canary Island banana supplies

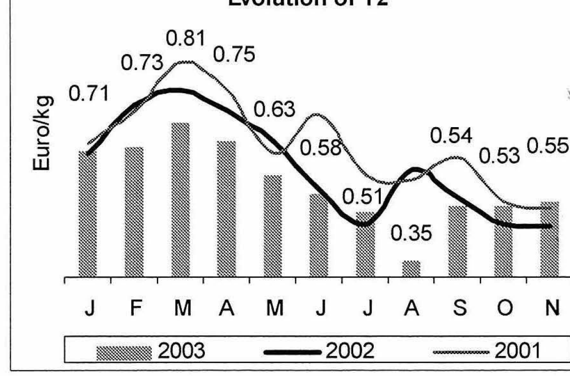


Movement of the price of super extra

Northern Europe

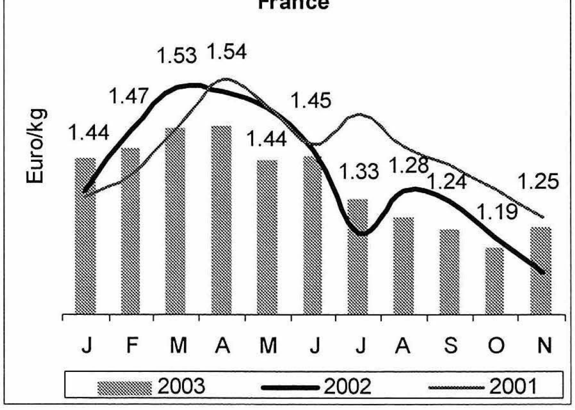


Dollar banana supplies
100 : November 2002

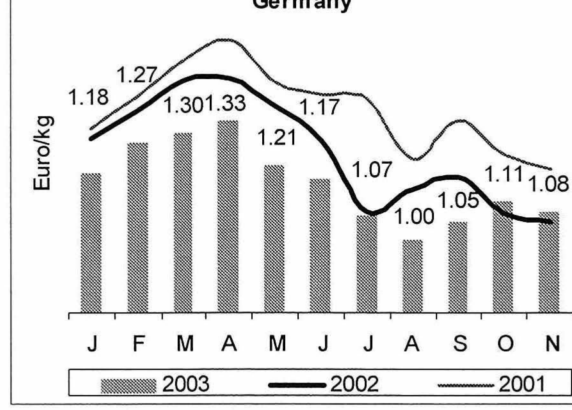


Evolution of T2

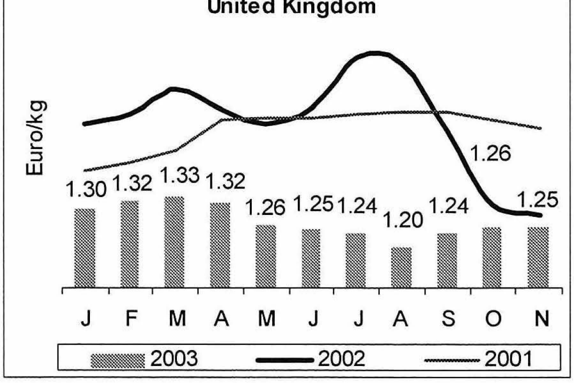
Retail price in Europe



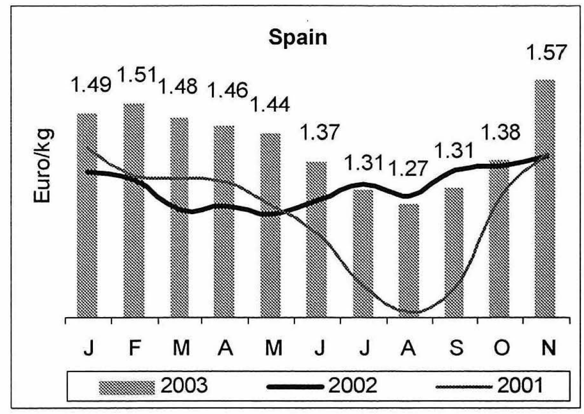
France



Germany



United Kingdom



Spain

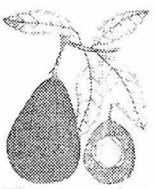
Sources: CIRAD-FLHOR, SNM, TW Marketing Consulting

Avocado

NOVEMBER 2003

Monthly comparison: Nov. 2003 / Oct. 2003	
Price	Volumes
↘ – 14%	=↗ + 1%

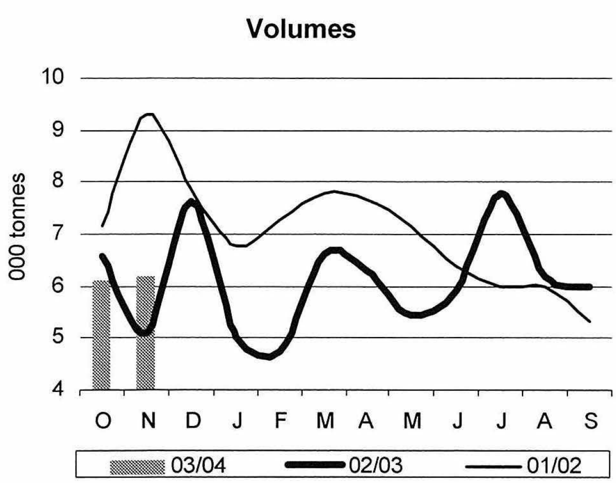
Annual comparison: Nov. 2003 / Nov. 2002	
Price	Volumes
↘ – 9%	↗↗ + 21%

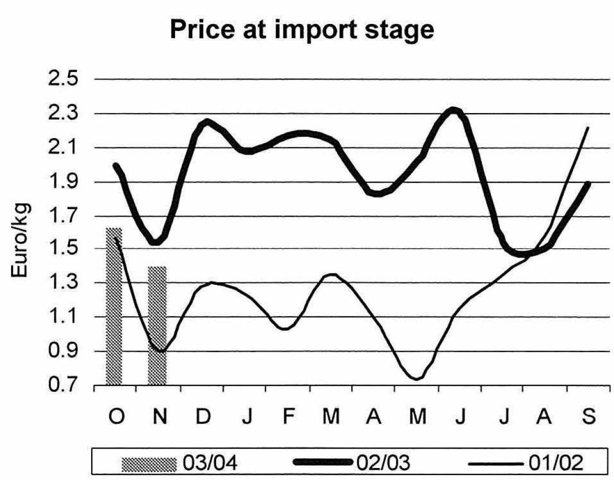


The average price was disappointing, with more supplies than last year but 20% less than average. This poor performance was caused by a particularly difficult market for green varieties. On the one hand, supplies were more plentiful than last year as the production of Spanish Bacon/Fuerte had returned to normal. On the other, the increasingly marked preference of the large supermarket chains for Hass had a very negative effect on sales.

The market for Hass behaved comparatively well. Growing supermarket demand for this variety formed a destination for the distinctly increased quantities from Mexico. However, the sometimes disappointing fruit quality meant that the particularly high 2002 prices were not equalled. This change in supermarket demand obviously affected the market for green varieties. Demand was sluggish for both Ettinger from Israel and Bacon/ Fuerte from Spain. In contrast, although supplies were still smaller than normal because of a marked shortfall in Israeli production, they were substantially greater than last year because Spanish shipments returned to normal. The average price was therefore disappointing in spite of the honourable performance of the market for Hass.

Estimated market releases in France





Estimated market releases in France by origin

Tonnes	November 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2003/2004	03-04/02-03	03-04/01-02
Spain	2 306	+ 94	- 38	3 843	+ 39	- 49
Mexico	1 531	+ 60	+ 10	7 060	+ 49	+ 4
Israel	2 036	0	0	2 748	- 39	- 50
Kenya	155	-	-	10 223	+ 67	- 1
Chile	145	0	-	1 394	+ 101	-
Total	**6 173**	**+ 21**	**- 34**	**25 268**	**+ 34**	**- 16**

Orange

NOVEMBER 2003

Monthly comparison: Nov. 2003 / Oct. 2003

Price	Volumes
↘ – 20%	↗↗ + 219%

Annual comparison: Nov. 2003 / Nov. 2002

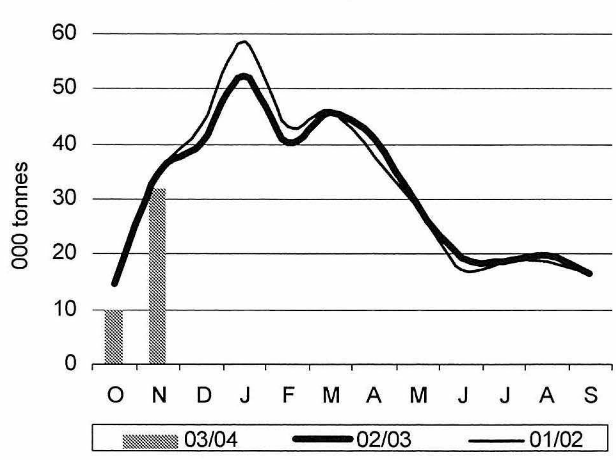
Price	Volumes
↗ + 17%	↘ – 7%

Performance was fairly satisfactory for Spanish operators—the only ones to be active in November, shipping Naveline and the very first Salustiana. It is true that the volumes sold were markedly down on preceding seasons. However, the decrease is counter-balanced by an increase in the average price, that peaked at a level rarely observed at this time of year.

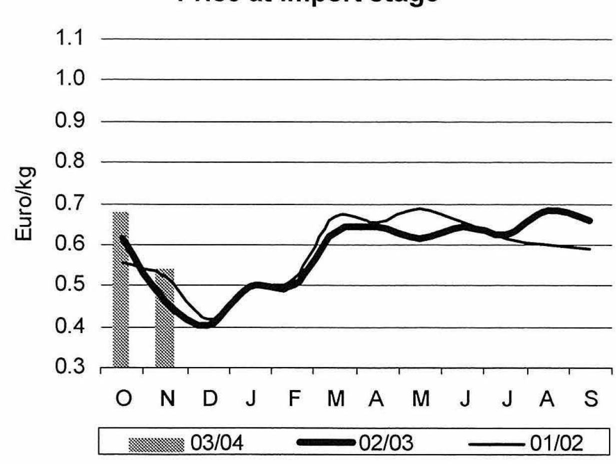
The quantities of Spanish Naveline, the main variety sold at this period of the year, were very measured. Production is only very slightly down on the last season but ripening is markedly late. Furthermore, Valencia producers had to slow the Naveline harvest and concentrate on clementine, whose condition became very delicate because of weather conditions. The timid beginning of the Salustiana season in the middle of the month did not make up for the shortage of supplies. Demand was not particularly dynamic and matched the quantities available. Prices therefore remained markedly higher than those of preceding years even though the market was very difficult for most fresh fruits.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	November 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2003/2004	03-04/02-03	03-04/01-02
Spain	31 802	- 7	- 7	37 881	- 14	- 13
Total	**31 802**	**- 7**	**- 7**	**37 881**	**- 14**	**- 13**

Grapefruit

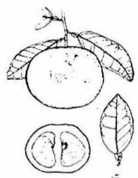
NOVEMBER 2003

Monthly comparison: Nov. 2003 / Oct. 2003

Price	Volumes
↘ – 18%	↗↗ + 66%

Annual comparison: Nov. 2003 / Nov. 2002

Price	Volumes
↗ + 4%	↘ – 7%

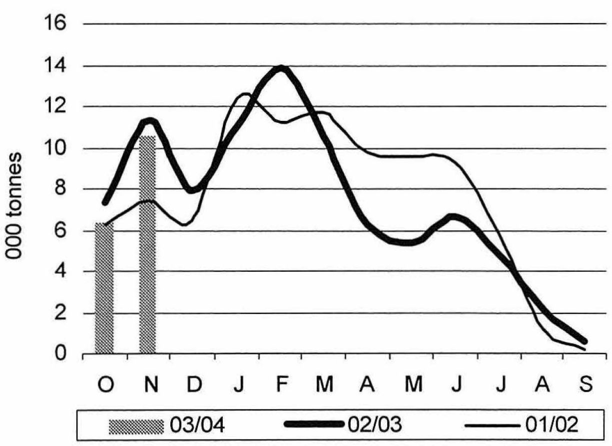


November marked the end of an exceptionally favourable six-month period. Unsurprisingly, demand was very slow during the second half of the month. In parallel, supplies returned to an average level with the true start of the Florida season at the beginning of the month. Prices were substantially re-adjusted, reaching a level close to the average of the preceding seasons.

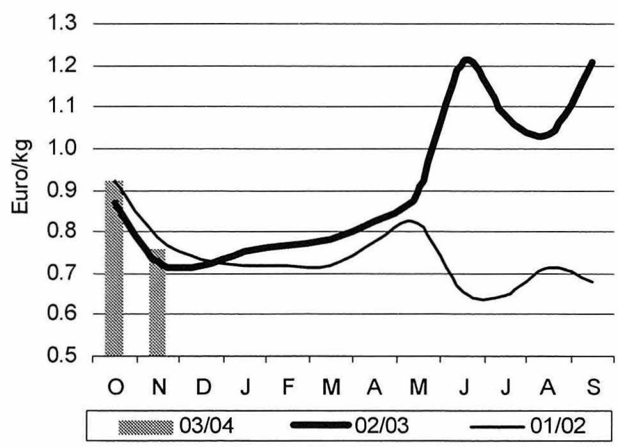
The trend in demand has been extremely classic and sales slowed from week 46. However, the intensity and universality of the movement surprised operators as even the top-of-the-range Florida brands were markedly affected. Supplies were slightly down on last year but distinctly more substantial than average. This marked a break with the shortage of supplies observed during the past six months. After being abnormally small in October because of rain, cumulated shipments from Florida almost equalled last year's in spite of a dip in week 48. Shipments from Israel and Turkey decreased distinctly in comparison with October as the market soon became difficult. In contrast, the quantities from Cuba were much too large for the practically non-existent demand. Prices were strong for all origins at the beginning of the month and were then strongly re-adjusted to a level much lower than average in week 48.

Estimated market releases in France

Volumes



Price at import stage



Estimated market releases in France by origin

Tonnes	November 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2003/2004	03-04/02-03	03-04/01-02
Florida	8 933	- 4	+ 53	12 344	- 15	+ 25
Turkey	755	- 44	- 15	2 446	- 10	- 4
Israel	837	+ 16	+ 28	2 067	+ 47	+ 68
Total	**10 525**	**- 7**	**+ 42**	**16 857**	**- 10**	**+ 24**

Easy peelers

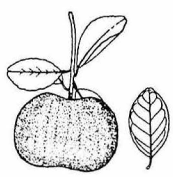
NOVEMBER 2003

Monthly comparison: Nov. 2003 / Oct. 2003

Price	Volumes
↘ – 5%	↗↗ + 80%

Annual comparison: Nov. 2003 / Nov. 2002

Price	Volumes
=↘ – 2%	↘ – 5%

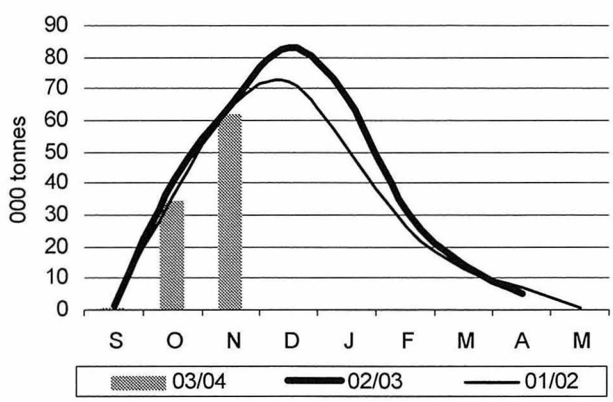


After a flamboyant start of the season, the easy peeler market changed completely in November. On the one hand, the quantities available increased considerably with the start of the Spanish Nules season, with large volumes, and the true start of the Corsican and Moroccan seasons. In addition, the appearance of serious problems of quality in a significant proportion of supplies (caused by heavy rainfall throughout the month in the main production zones) had a very negative impact on demand.

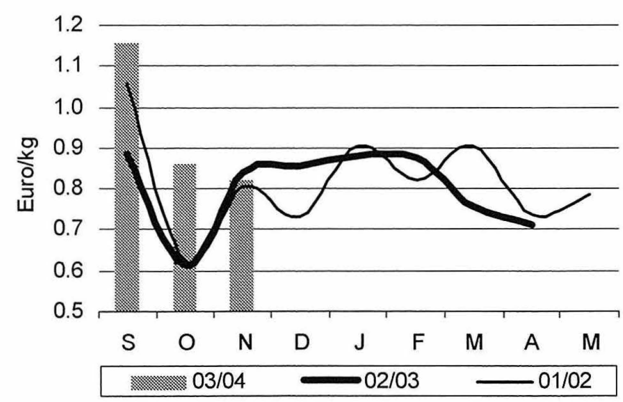
After being very modest at the very beginning of the season, supplies increased markedly from the beginning of the month onwards. The start of the season for Nules from Spain, with generous quantities of fruits, enabled exporters to considerably increase the rate of shipments. This was all the more marked because frequent keeping problems resulting from alternating rainy periods and high temperatures obliged growers to speed up harvesting. Similar reasons account for the extremely rapid increase in shipments from Morocco and the concentration of flows in nearby markets such as France. Corsica also entered the market, but supplies were down. Demand was slowed by unsuitable weather for citrus consumption and cautious because of the quality of a large proportion of the fruits available and was soon insufficient. The market began to recover at the end of the month but only for fruits of satisfactory keeping quality such as brands at the high end of the range and a large proportion of Corsican production. The average monthly price plummeted in comparison with the preceding month and was even distinctly below average.

Estimated market releases in France

Volumes



Price at import stage

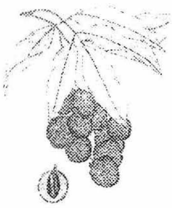


Estimated market releases in France by origin

Tonnes	November 2003	Comparisons (%)		Season total	Season comparisons (%)	
		2003/2002	2003/2001	2003/2004	03-04/02-03	03-04/01-02
Spain	48 362	- 12	- 6	82 961	- 14	- 7
Morocco	7 494	+ 166	+ 34	8 115	+ 188	+ 36
Corsica	6 068	- 16	- 14	6 068	- 74	- 65
Total	**61 924**	**- 5**	**- 4**	**97 144**	**- 10**	**- 5**

Litchi

NOVEMBER 2003	Imported volumes in Europe by air (estimates in tonnes)				
	Weeks 2003	**45**	**46**	**47**	**48**
	Mauritius	2	13	51	36
	Réunion				10

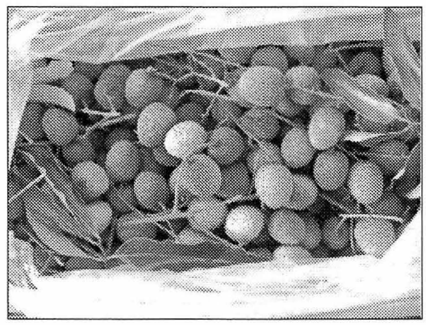


In contrast with last year, litchi production in the Indian Ocean is more normal although the weather conditions have not always been favourable. The start of the harvest in the various production areas is nonetheless a little late and the market is fairly sluggish.

This year's litchi exports from **Mauritius** started a good ten days later than last year. Quantities were initially small and then increased fairly rapidly as the weeks went by. They dominated the market until the end of the month as there was no competition. Deliveries from this origin consisted mainly of destemmed, sulphur-treated fruits, completed by a few small shipments of fresh litchis on the branch. Fruit size was generally small in the first shipments and improved slightly in the middle of the month. The flavour of the first fruits was little marked, being acid in the first shipments and then improving. Buyers were seen to be reluctant to purchase these medium-quality fruits for which high prices were asked. The limited quantities received made it possible to move the produce without too much trouble, but at prices tending to fall.

The first litchis shipped from **South Africa** by air (destemmed fruits/ sulphur-treated) reached the market from week 48 onwards. Lacking colour and ripeness, they were nevertheless better graded and larger as a whole.

The first shipments (destemmed/fresh) from **Réunion** arrived during the first week of the month, adding to supply from the other origins. The fruits from Réunion were also of medium quality in terms of colour and ripeness. These fruits also changed rapidly as strong condensation in the plastic bags used to package them caused the spotting of fruit shells.



Large tonnages are expected by sea from **Madagascar** from mid-December onwards, with at least five ships scheduled. Indeed, 16 500 palettes should be dispatched on conventional ships by the end of the year (in comparison with 12 000 last year). The season will then continue with fruits shipped in sea containers.

The Madagascan litchi season was monitored by Pierre Gerbaud for CTHT thanks to European Union funding (STABEX resources).

MADAGASCAR
CTHT
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Litchi by air — Price in euros per kg — Import stage in France

Weeks	46		47		48	
Seasons	**2002/2003**	**2003/2004**	**2002/2003**	**2003/2004**	**2002/2003**	**2003/2004**
Mauritius						
Fresh on the branch	10.00 - 11.00	11.00 - 12.00	9.00 - 10.00	11.00 - 12.00	9.00 - 10.00	
Destemmed/sulphur-treated	8.00	9.00 - 10.00	7.00 - 8.00	8.00 - 9.50		6.50 - 7.50
Réunion						
Fresh on the branch					10.00 - 11.00	10.00 - 11.00
South Africa						
Destemmed/sulphur-treated					5.79	6.00 - 9.00